



Storyboard

Private Provider Monthly Summary Entries and ICD-10 Codes

This storyboard demonstrates how to enter a Monthly Summary and document ICD-10 codes. Monthly Summaries show up in Case Recordings only when marked 'Completed'.

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Private Provider Monthly Summary Entries

Viewing Workload Screen

- **Home** Screen
- **Workload** tab
- **Viewing Worker** box: System defaults to the name of the person logged into the system
- **Viewing for:** Lists the workload currently being viewed
- **Supervises section:** Will see list of all personnel being supervised
- **Field Grid:** Current log in viewing of Private Provider's Work Item assignments

Type	ID	Name	Assignment Role
Ongoing Case	30	Dun	Private Provider Worker
Ongoing Case	30	Dun'	Private Provider Worker
Ongoing Case	25	Gai	Private Provider Worker
Ongoing Case	43	Park	Private Provider Worker

Viewing the Provider Monthly Summary Icon

- From **Ongoing Case**
- Click the **Monthly Summary** icon to navigate directly to the Monthly Summary page

Type	ID	Name	Assignment Role
Ongoing Case	25	Brev	Private Provider Worker

Select Recordings

Provider Monthly Summary

Case Status: Case Status Date: 03/31/2016

Organization

- The paper icon is associated with the "Provider Monthly Summary". If you hover over the icon, a "Provider Monthly Summary" pop up label is visible. If previous Summaries have been entered, you can access and read them via this icon.

- You are automatically directed to the Add Monthly Summary.

Home > Workload

Work Item Header
 Work Item ID: 11 Work Item Type: Placement Start Date: 03/09/2016 End Date:

Add Monthly Summary

Provider Name: Placements/Services: Level 2 Continuum / Level 2 Continuum

Child Name: Brew

Service Period Month*: Service Period Year*: ICD Code*: Search

ICD Description:
 Narrative:

Spell Check Clear

Status: Draft

Apply Save Cancel

- **Service Period Month*** - required field. Choose the month from the dropdown.
- **Service Period Year*** - required field. Choose the Year from dropdown.
- **ICD Code***: Click **Search** to identify the correct ICD code.

Below shows how the screen will look.

Service Period Month*: Service Period Year*: ICD Code*: Search

ICD Description:
 Narrative:

Entering the ICD Code

The steps to entering an ICD code will be the same as previously outlined until you get to the ICD Code Search step.

- Enter ICD Code if known **OR**
- Enter ICD Description in box
- Click **Search**.

Home > Workload > Monthly Summary Detail | help |

ICD Search Criteria

ICD Code:

ICD Description:

ICD Search Results

ICD Code	ICD Description
No items to display	

Choose

All ICD codes will display containing the ICD description entered.

- Determine which code is correct.
- Click on the correct code and it will highlight the row.
- Click **Choose**.

ICD Search Criteria

ICD Code:

ICD Description:

ICD Search Results

ICD Code	ICD Description
F900	Attention-deficit hyperactivity disorder, predominantly inattentive type
F901	Attention-deficit hyperactivity disorder, predominantly hyperactive type
F902	Attention-deficit hyperactivity disorder, combined type
F908	Attention-deficit hyperactivity disorder, other type
F909	Attention-deficit hyperactivity disorder, unspecified type

1 - 5 of 5 items

TFACTS Storyboard • Private Provider Monthly Summary Entries and ICD-10 Codes

- A pop up message “Are you sure you wish to link this ICD code?” will display.
- Click **OK**.

The screenshot shows the TFACTS interface with a pop-up dialog box asking for confirmation to link an ICD code. The dialog box has an 'OK' button highlighted with a red box. Below the dialog, the 'ICD Search Results' table is visible, showing a list of ICD codes and descriptions. The first row, F901, is highlighted in orange.

ICD Code	ICD Description
F900	Attention-deficit hyperactivity disorder, predominantly inattentive type
F901	Attention-deficit hyperactivity disorder, predominantly hyperactive type
F902	Attention-deficit hyperactivity disorder, combined type
F908	Attention-deficit hyperactivity disorder, other type
F909	Attention-deficit hyperactivity disorder, unspecified type

The screen below displays a ‘Completed’ Monthly Summary entry after the ICD-10 codes go into effect.

- **Note:** *The Status cannot be ‘Completed’ unless the Narrative field is populated.
- **Note:** *You cannot print Monthly Summaries unless they are in the ‘Completed’ status.
- **Status:** Choose ‘Completed’ if the Monthly Summary entry is completed.
- Click **Apply** to remain on the Add Monthly Summary page to review your entry, OR
- Click **Save**, which will navigate you back to your Workload page.

The screenshot shows the 'Add Monthly Summary' form. The 'Status' dropdown menu is set to 'Completed' and is highlighted with a red box. The 'Narrative' field contains the text 'test'. The 'Apply' and 'Save' buttons are also highlighted with red boxes.

Provider Name: [Redacted] Placements/Services: Level 2 Continuum / Level 2 Continuum

Child Name: [Redacted]

Service Period Month: March Service Period Year: 2016

ICD Code: F901 Search

ICD Description: Attention-deficit hyperactivity disorder, predominantly hyperactive type

Narrative: test

Status: Completed

Buttons: Apply, Save, Cancel

Monthly Summary Status List

- Monthly Summary's that have been previously started –'Draft' or any that are marked 'Completed' will display, as well as 'Created in Error' will display.
- Monthly Summary's will only be saved as a Case Recording when they've been marked as 'Completed'

'Draft' Status

The screen shot below displays a Monthly Summary record in '**Draft**' status.

The screenshot shows the 'Monthly Summary List' interface. At the top, there is a 'Person Header' section with fields for Name, Gender (Female), DOB, Person ID, SSN (XXX-XX-6232), and Age (16 Yrs). Below this is a table with columns: Provider Name, Child Name, Service Period, ICD Type Code, ICD Code, and Status. The first row shows 'Bell, Brew' with Service Period '04/2016', ICD Type Code 'ICD-10', ICD Code 'F901', and Status 'Draft' (highlighted with a red box). The second row shows 'Bell, Brew' with Service Period '03/2016', ICD Type Code 'ICD-10', ICD Code 'F901', and Status 'Completed'. Below the table are navigation controls (back, forward, search, etc.) and a 'Select' button (highlighted with a red box). A 'Close' button is at the bottom.

Making updates to a Monthly Summary in 'Draft' status

- On the Monthly Summary List page, click on the Monthly Summary you wish to review or update, it will be highlighted.
- Click **Select**.

This screenshot is similar to the previous one, but the first row (Bell, Brew, 04/2016, ICD-10, F901, Draft) is highlighted in orange. The 'Select' button is now highlighted with a red box, indicating it has been clicked. The 'Status' column still shows 'Draft'.

Note: The screen shot below displays the updated Monthly Summary record again saved in 'Draft' status.

The screenshot shows the 'Monthly Summary Detail' interface. It includes fields for Provider Name, Child Name, Service Period Month (April), Service Period Year (2016), ICD Code (F901), and ICD Description (Attention-deficit hyperactivity disorder, predominantly hyperactive type). There is a 'Narrative' text area with the word 'test'. At the bottom, the 'Status' dropdown menu is highlighted with a red box and shows 'Draft'. There are 'Apply', 'Save', and 'Cancel' buttons at the very bottom.

‘Completed’ Status

- Below is a screen shot of a Monthly Summary record that is in ‘Completed’ status.
- Note:** It is no longer editable.
- Note:** This will now show up in Case Recordings because it is marked ‘Completed’.
- Note:** To print- the entry will display in Case Recordings for printing.

Person Overview > Monthly Summary List

Person Header

Name: [Redacted] Gender: Female DOB: [Redacted]
 Person ID: [Redacted] SSN: XXX-XX-6232 Age: 16 Yrs

Monthly Summary Detail

Provider Name: [Redacted] Placements/Services: Level 2 Continuum / Level 2 Continuum
 Child Name: [Redacted]

Service Period Month: March Service Period Year: 2016

ICD Code: F901
 ICD Description: Attention-deficit hyperactivity disorder, predominantly hyperactive type

Narrative: test

Status: Completed

Close

‘Created in Error’ Status

- If a Monthly Summary needs to be ‘Marked in Error’, click the ‘**Mark in Error**’ button.
- Only Monthly Summaries in a ‘**Completed**’ status can be marked in error.

Person Header

Name: [Redacted] Gender: Female DOB: [Redacted]
 Person ID: [Redacted] SSN: XXX-XX-6232 Age: 16 Yrs

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Bell,	Brew	04/2016	ICD-10	F901	Draft
Bell,	Brew	03/2016	ICD-10	F901	Completed

10 Items per page 1 - 2 of 2 Items

Select Mark In Error

Close

TFACTS Storyboard • Private Provider Monthly Summary Entries and ICD-10 Codes

- When marking a Monthly Summary record in error, TFACTS will display a warning message stating, 'Are you sure you want to Mark this Monthly Summary in Error?'
- Click **OK** if you are sure you want to mark the Monthly Summary record in error. If not, click Cancel.

The screenshot shows the TFACTS interface with a warning dialog box open. The dialog box text is: "staging.dcs.tn.gov says: Are you sure you want to Mark this Monthly Summary in Error?". The "OK" button is highlighted with a red box. Below the dialog box, the "Monthly Summary List" table is visible. The table has columns: Provider Name, Child Name, Service Period, ICD Type Code, ICD Code, and Status. The first row shows "Bell, Brew" with "04/2016" service period, "ICD-10" type, "F901" code, and "Draft" status. The second row shows "Bell, Brew" with "03/2016" service period, "ICD-10" type, "F901" code, and "Completed" status. The "Mark In Error" button is highlighted with a blue box.

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Bell, Brew	Brew	04/2016	ICD-10	F901	Draft
Bell, Brew	Brew	03/2016	ICD-10	F901	Completed

- Immediately upon clicking OK, TFACTS changes the status of the Monthly Summary record to '**Created in Error**' and subsequently marks the Case Recording '**Created in Error**' as well.

The screenshot shows the TFACTS interface after the status change. A message at the top says "Your data has been saved." and "close confirmation". The "Monthly Summary List" table now shows the status of the second row changed from "Completed" to "Created In Error". The "Created In Error" text is highlighted with a red box. The "Mark In Error" button is still visible.

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Bell, Brew	Brew	04/2016	ICD-10	F901	Draft
Bell, Brew	Brew	03/2016	ICD-10	F901	Created In Error

“Narrative Needed” status

- **Narrative Needed** occurs when either a monthly summary was in draft status or no monthly summary was present, but a payment request record was approved by DCS Central Office.
- In order to enter the information, click on the line to highlight, click **Select**

Person Overview

Person Header

Name: Gender: Male DOB:
 Person ID: SSN: Age: 18 Yrs

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Florence Crittenton Agency		03/2017	ICD-10	F1220	Narrative Needed
Florence Crittenton Agency		02/2017	ICD-10	F1220	Completed

10 items per page 1 - 2 of 2 items

Select Mark In Error

- Enter the Narrative and click **Save**
- Note: The status of **Narrative Needed** can't be changed

Monthly Summary Detail

Provider Name: Florence Crittenton Agency Placements/Services: Level 3 Enhanced / Level 3 Enhanced Alcohol & Drug Treatment

Child Name:

Service Period Month: March Service Period Year: 2017

ICD Code: F1220

ICD Description: Cannabis dependence, uncomplicated

Narrative:

Spell Check Clear 31978

Status: Narrative Needed

Apply Save Cancel

How to Retrieve a Monthly Summary

How to Retrieve a Monthly Summary via the Workload Page.

- Click paper icon to access previously existing Monthly Summary.

Home Case Resource Administration Workload Desktop Calendar

Viewing for Ford, Anthony J

Search: Fo

Supervises

Type	ID	Name	Assignment Role
Ongoing Case	25	Brew	Private Provider Worker

Select Recordings Case Status: Case Status Date: 03/31/2016 Organization:

Icons: [Person] [Paper] [Plus] [Link]

- Select which Monthly Summary from the Monthly Summary List by clicking on the row which will automatically highlight the chosen row.
- Click Select

Work Item Header

Work Item ID: 112 Work Item Type: Placement Start Date: 03/09/2016 End Date:

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Bell,		04/2016	ICD-10	F901	Draft
Bell,	Brew	03/2016	ICD-10	F901	Completed

10 items per page 1 - 2 of 2 items

Select Add Mark In Error

Close

- The Monthly Summary that is selected will populate.

Work Item Header

Work Item ID: 112 Work Item Type: Placement Start Date: 03/09/2016 End Date:

Monthly Summary Detail

Provider Name: Child Name: Placements/Services: Level 2 Continuum / Level 2 Continuum

Service Period Month: March Service Period Year: 2016

ICD Code: F901

ICD Description: Attention-deficit hyperactivity disorder, predominantly hyperactive type

Narrative: test

Status: Completed

Close

How to Retrieve a Monthly Summary via a Person Search



- Click on Person icon to access person profile.

For Viewing for Ford, Anthony J 1 0

Supervises

Type	ID	Name	Assignment Role
Ongoing Case	25	Brew	Private Provider Worker

[Select Recordings](#) Case Status: Case Status Date: 03/31/2016 Organization:

- Click **Monthly Summary** link.

Person Overview

Person ID: Gender: Female

Name: DOB:

Address: Age: 16 Yrs

Phone/Contact: Employee: No

Person Details

[Person Profile](#) [Person Characteristics](#) [Scan Documents](#)

[Education](#) [Legal History](#) [Monthly Summary](#)

[Health](#) [TFACTS History](#) [Military History](#)

[Financial](#) [Relationship History](#) [Merge History](#)

[Assessment History](#)

- The Monthly Summary list will display.

Person Overview






Person Header

Name: Gender: Female DOB:

Person ID: SSN: XXX-XX-6232 Age: 16 Yrs

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Bell,	Brew	04/2016	ICD-10	F901	Draft
Bell,	Brew	03/2016	ICD-10	F901	Completed

     10 Items per page 1 - 2 of 2 Items

[Select](#) [Mark In Error](#)

[Close](#)

Printing Monthly Summaries

- Monthly Summary's in 'Completed' Status are available to print as a Case Recording.
- Click **Recordings** from within the case you wish to print.

- Click **select** by the Provider Monthly Summary you wish to print (must be in 'Completed' status).

[Removal Records](#)
[Placement Referral](#)
[Placement](#)

[Individual Program Plan Classification](#)
[PreDisposition Report](#)
[Special Caution Alert](#)

[Incident Reports](#)
[IL Program Eligibility and Service](#)

Recording List

[Add Recording](#)
[Print](#)

Result(s) 1 to 200 of 200

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Recording ID	Status	Contact Date	Contact Method	Contact Type	Participant	Entered By	Location
270	Completed	04/12/2016	Face To Face	Private Provider/Child Contact	Brewer	Ford	Resource Home
271	Completed	04/01/2016		Provider Monthly Summary	Brewer	Ford	

- Right click on your mouse.
- Select **Print** from drop down box.

OR

- While in the Family Case, click on **Print** button

[Removal Records](#)
[Placement Referral](#)
[Placement](#)

[Individual Program Plan Classification](#)
[PreDisposition Report](#)
[Special Caution Alert](#)

[Incident Reports](#)
[IL Program Eligibility and Service](#)

Recording List

[Add Recording](#)
[Print](#)

Result(s) 1 to 200 of 200

Recording ID

Status

Contact Date

Contact Method

Contact Type

Participant

Entered By

Location

select

27082901

Completed

04/12/2016

Face To Face

Private Provider/Child Contact

Brewer, Kandace Michelle; Ford, Anthony J

Ford, Anthony J

Resource Home

select

27113932

Completed

04/01/2016

Provider Monthly Summary

Brewer, Kandace Michelle

Ford, Anthony J

Page 1 of 1

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- Check each box you wish to Print

Print Recording List
Result(s) 1 to 200 of 200 Page 1 of 1

<input type="checkbox"/>	Recording ID Status	Contact Date Contact Method	Contact Type	Participant	Entered By Location
<input type="checkbox"/>	270 Completed	04/12/2016 Face To Face	Private Provider/Child Contact	Brew...	Ford Resource Home
<input checked="" type="checkbox"/>	711 Completed	04/01/2016	Provider Monthly Summary	Brew...	Ford

- Scroll to bottom of page and click **Generate** button.

Generate **Close**

- Click **Generate Report** button.

Reports

Document Category: CASE Document Title: Case Recording Summary - #NA
 Work-Item ID: 29 Work-Item Reference:
 Task ID: 50 Task Reference:

Document History

Document ID	Date	Document Name

Generate Report **Cancel**

- Click **Save Form**.

< >

Save Form **Cancel**

You have completed this storyboard.